

### **Applicant User Guide**

**Economic & Community Development Services Department** 





# ePlan Applicant User Guide **Table of Contents**

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### Introduction to ePlan

Electronic Plan Review (ePlan) is a web-based solution that allows plans for Building Permits and Development Projects to be submitted electronically, replacing the traditional paper-based review method. ePlan will improve the plan review cycle, reduce costs associated with obtaining building permits and development approvals as well as support green initiatives.

This manual provides basic documentation on the steps involved in the Electronic Plan Review (ePlan) process. It has been prepared as a general reference guide and is not designed to present every detail or situations on every element of the process. There are text descriptions and screen images of the step-by-step tasks necessary to complete a submittal and review using ePlan.

If at any time in the process you have questions or concerns, do not hesitate to call. Be sure to ask to speak to a System Administrator in one of the following divisions:

#### **Economic & Community Development Services Department**

Planning and Development Division 407-665-7371 eplandesk@seminolecountyfl.gov

Building Division 407-665-7050 bpcustomerservice@seminolecountyfl.gov

ePlan web address https://eplan.seminolecountyfl.gov/epr

NOTE: In addition to this user manual, please reference the help documentation available within the ePlan Review Web portal for further assistance.







### **Electronic Plan Submission**

Please complete the following prior to getting started:

- For Building Permits, review the "<u>How to Apply for Your Permit Online</u>" guide for instructions on submitting an application online. You must have an application number and receive an invitation to use ePlan before electronically uploading your plan drawings and documents.
- For Planning & Development projects, please visit the "<u>Electronic Plan Review</u>" webpage for instructions on submitting an application.
- Review the standards for naming your drawing and document files, sheet sizes, file formats accepted, etc. (Review the entire "Standards" section of this guide.)

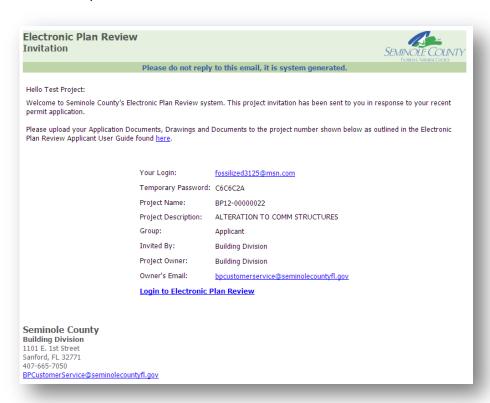
#### ePlan Review Invitation

When your application for a Building Permit or Development Project is reviewed and accepted, an Electronic Plan Review invitation will be sent to your e-mail address. For first time users, the invitation e-mail will contain your login information, temporary password and information about the project, including a link to the ePlan web portal.

# You MUST use Internet Explorer

If your default web browser is not Internet Explorer, you must enter ePlan manually by opening Internet Explorer and typing the following web address:

https://eplan.seminolecountyfl.gov



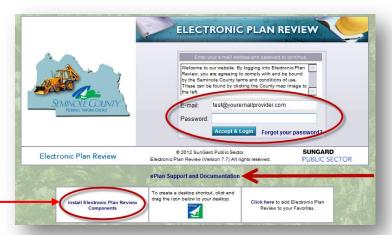




#### Logging In

#### **New Users First Time Login**

- 1. Prior to logging into the Electronic Plan Review web portal, the following actions <u>must</u> be completed:
  - The login page has an MSI (Microsoft Silent Install) component required to install all necessary Electronic Plan Review ActiveX controls (see image below). This installation will only need to be done once; if you utilize a different computer it will require another installation for each different computer used for ePlan.
  - If your computer's operating system is Windows Vista or Windows 7, User Account Control (UAC) needs to be turned off for the installation of the ActiveX controls. After the components are installed, log into the ePlan web site and allow new ActiveX components to be installed as prompted (additional prompts may appear at other points besides the ePlan login, for example when viewing a file). For instructions on how to turn off UAC, click <a href="here">here</a> for Vista instructions or click <a href=here</a> for Windows 7 instructions. User Account Control may be turned back on if desired after ePlan has been successfully run and allowed to install all ActiveX controls.
  - Electronic Plan Review uses pop-up windows (windows with no toolbars). If you login but no ePlan window appears, you probably have a pop-up blocker in use that is preventing the main project window from opening. You will need to disable pop-up blocking in order to utilize the ePlan application. (Pop-up blockers allow you to disable pop-up blocking for specified sites if you wish to leave it on and exclude ePlan.)
- 2. To sign in, enter your e-mail address and temporary password provided in your invitation email and click the "Accept & Login" button, as shown in the image below:



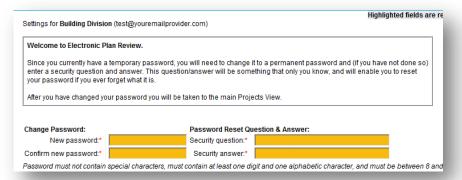
#### TIP!

Click the ePlan Support and Documentation link shown here to access the County ePlan website.





3. Enter your new password and personal account information. All fields in yellow are required. Click on the "Save" button to save your profile.





#### **Existing Users**

- If you are a returning user, login to ePlan with your full e-mail address and password.
- If you have forgotten your password, click on the "Forgot Password" button so that you can retrieve it through your security question.



 NOTE: No one can see your password or security question answer. If you cannot access your account after trying to retrieve your account information, contact a Seminole County ePlan Administrator at 407-665-7050 for Building Permits or 407-665-7371 for Development Projects to have your password reset. An email will be automatically generated and sent to the account holder email address with a temporary password.





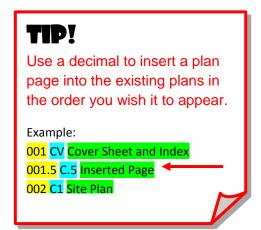
### **Standards**

#### **Plan File Naming Standards**

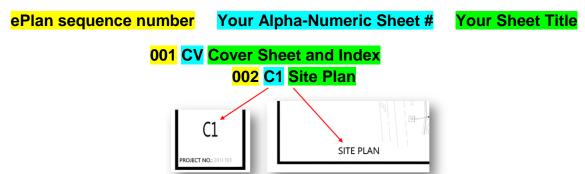
When preparing to upload your drawings / plan pages to the ePlan system, please follow the file naming structure shown below:

#### **Drawings**

- 1. All drawings must be uploaded as individual files and saved in a horizontal orientation, by sheet name.
- 2. All file names will begin with an ePlan three digit number that flows in sequence. Example: 001, 002, 003 etc. IMPORTANT NOTE: The plan Cover Sheet must always begin with 001 and the Index Sheet must always begin with 002 (unless combined with the cover sheet).
- 3. The second part of the file name will be any alpha-numeric number you have assigned to each page. Example: <u>L1</u> Landscaping, <u>E1</u> Electrical, etc.
- 4. The third part of the file name will be the title that you have given each sheet. Example: Building Elevation Detail, Electrical Riser, Site Lighting, Foundation, etc.



See below for a sample of sheet names using the requested ePlan numerical sequence with your individual alpha-numeric sheet # and sheet titles:



#### **Documents**

- 1. Documents that contain multiple pages such as truss engineering, energy calculations, product approval forms, geotechnical reports, stormwater reports, etc may be uploaded as multipage files and the file name shall indicate what the document is.
- 2. Separate document types shall be uploaded as separate files.





#### **File Type Standards**

- Only searchable PDF files are accepted for calculations, reports and other supporting plan documentation (non-drawing files).
- Both vector PDF and Design Web Format (DWF) files
  will be accepted for drawing files. Since AutoCAD
  software is commonly used to create drawing files,
  converting a DWG to DWF file print ready is the
  preferred secured file format. Files must be 2D DWF file
  print ready. The DWF must be saved as Auto CAD
  version 10 or lower format. EPlan does not support 3D
  DWF files at this time.
- If you choose to create PDF files, you will need to convert your AutoCAD files to a Vector PDF. It is recommended that drawings created in AutoCAD are converted to a Vector PDF within the AutoCAD program itself. In addition, the newest Adobe Acrobat (not the free version of Adobe Reader) will accommodate the creation of a Vector PDF.

### Design Professional Stamps and Signature Standards Using the Professional's Electronic Data Delivery System (PEDDS)

- <u>PEDDS</u> is a free program that is used to digitally sign and seal documents. This system
  is <u>required</u> to be used in lieu of the traditional embossed or ink seal normally placed on
  construction drawings. PEDDS is officially recognized by <u>Board of Architecture and</u>
  <u>Interior Design</u> and the <u>Florida Board of Professional Engineers</u>.
- Architects and Engineers are required to submit their certification of the drawings through the PEDDS system. Answers to what PEDDS is can be found <u>HERE</u>, and can be downloaded <u>HERE</u>.
- The signed and sealed PEDDS Signature Document and Signature Report <u>must be</u>
   scanned and uploaded at the time of <u>submittal</u> and again at the end of the review if any
   changes or corrections were made to the original plans submitted. In addition, the original
   signed and sealed Signature Document must be mailed in or delivered in person and is
   required before the plans can be released to the applicant.
- The PEDDS Signature Document and Signature Report must be submitted by each design professional that may collaborate on a project. For example a project may have different design professionals for Architectural, Structural, Mechanical, Electrical, Civil, Fire Protection, etc.

### WHY VECTOR PDF'S?

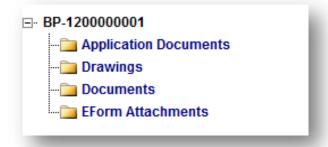
Vector based PDF's can be scaled by any amount without any degrading image quality. It allows the plans to be reviewed in a much higher level of clarity on a computer screen.





#### **Folder Structure Standards**

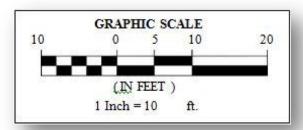
- All Building permit or Development project application forms must be uploaded into the "Application Documents" folder for each project.
- All drawing files and their associated PEDDS reports must be uploaded into the "Drawings" folder for each project.



- All supporting documents and any of their associated PEDDS reports must be uploaded into the "Documents" folder for each project. Sample document types would be truss engineering, energy calculations, product approval forms, geotechnical reports, stormwater reports, etc.
- The EForm Attachments folder is not used for uploading of files.

#### **Graphic Scale Standards**

- DWF, DWG and PDF plan pages should be properly oriented in landscape mode for efficient review.
- Each sheet must have a typical graphic scale as shown in the image to the right.
- When more than one scale is used on a sheet, an independent graphic scale must accompany the applicable detail.
- All plans must be drawn to scale.



#### **File Sheet Size and Orientation Standards**

- For Development Projects, all drawing files must be drawn and formatted for a minimum horizontal 24" x 36" sheet file, except Plats which are drawn to a 20"x24" sheet file.
- For Building Permits, all drawing files must be drawn and formatted for a minimum horizontal 24" x 36" sheet file or horizontal 11" x 17" sheet file for smaller scale jobs (pool enclosures, pools, termite repairs, etc.).
- Plan pages shall be properly oriented in landscape mode for an efficient review.





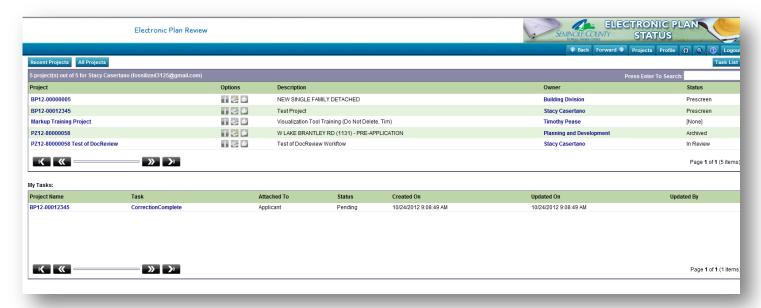
# Uploading Plan Drawings and Documents

 When you have successfully logged in to ePlan, the "Project" screen will display. Any projects for which you have access will display in this list. Any outstanding tasks that require

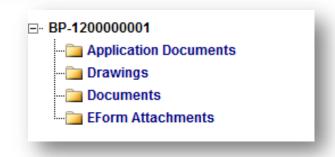


Please read this entire section before attempting to upload. Once all required items are uploaded, you must notify the <u>Submissions Group</u> (see steps 7-12).

your action are displayed in the "My Tasks" area below the project list. Select the specific project that corresponds to the plans you will be uploading by clicking on the project number. The projects are listed in order by application number (i.e. BP11-00001234, Planning & Development projects will have a PZ prefix).



 Click the "Drawings" folder to upload your plans or the "Documents" folder to upload supporting plan documents or the "Application Documents" for all forms related to the project application. Follow the prompts for uploading your plans and documents.

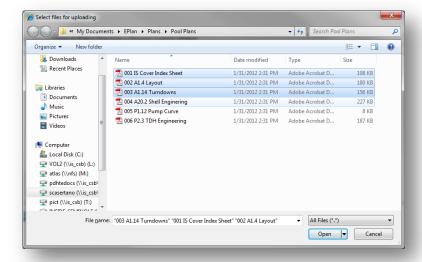


3. Click the "Upload Files" button.





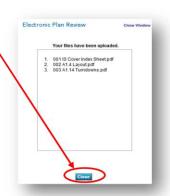
4. Select or browse to the file location on your computer. Select or highlight the files you want to upload; multiple files can be selected by using your Shift or Ctrl keys. Click the "Open" button.

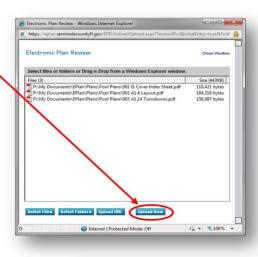


NOTE: Seminole County requires that all drawings be uploaded as individual files and saved in a horizontal orientation, by sheet name according to the file naming standards contained in this guide. See pages 6 & 8 respectively.

5. After reviewing the files, click the "Upload Now" button. The files will be copied to the upload

window. Click on the "Close" button to close out of the dialog box.





6. Once files are uploaded to the folder(s), the folder list is populated with thumbnail images of each file contained in the folder. Under each thumbnail, the file name, author, date, and any relevant file icons display.



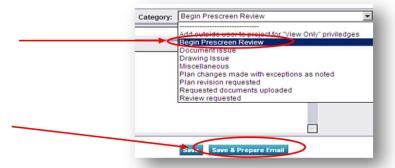




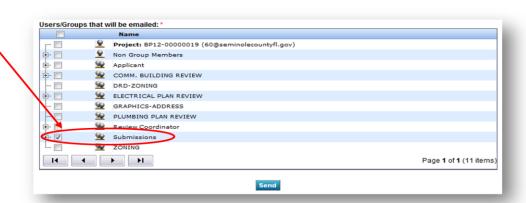
- 7. Once all documents and drawings have been uploaded, the Submissions Group needs to know that you are ready to begin the Prescreening process. Do this by clicking the icon near the top right corner of the ePlan window.
- 8. A window will pop up; click the "Add Topic" button.



- 9. Select the "Begin Prescreen Review" category from the drop down menu.
- 10. Enter a subject and brief description then choose "Save & Prepare Email".



11. Place a checkmark in the "Submissions" group and click "Send".



- 12. You have successfully finished part one of submitting your plans electronically.
- 13. Please logout after your session is complete.





NOTE: For Planning & Development projects, fees must be paid at the time of application submittal.

NOTE: For Building Division permits, plan review deposits are required to be made prior to plan review by cash/check or by setting up an escrow account.

#### **Security Timeout**

Due to security and resource concerns, the system will automatically sign you out after 90 minutes of inactivity. When you are ready to resume working with the system, click any button on the ePlan screen. The system automatically will load the sign-in page for you. You can also close the web browser window and reload the sign-in page manually in a new browser window.

https://eplan.seminolecountyfl.gov/epr





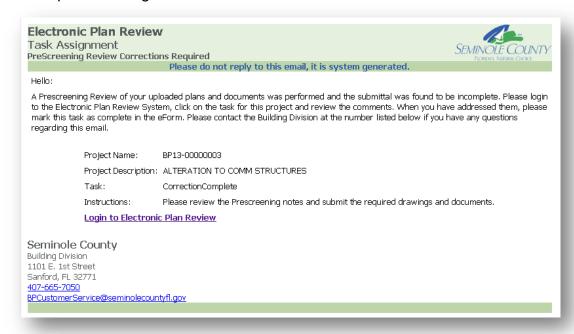
### **Prescreening**

#### **Prescreening Has Been Approved**

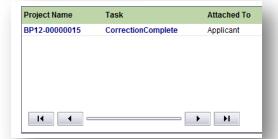
 If your submittal is approved, your plans and documents will continue through the ePlan system for review by Seminole County.

#### **Prescreening Has Been Returned**

• If your submittal requirements were not complete, you will receive an e-mail notification that prescreening has been denied and corrections are needed.



 Login to Electronic Plan Review. Find the project and associated task in the Task List, click the "CorrectionComplete" task and accept it.



#### TIP!

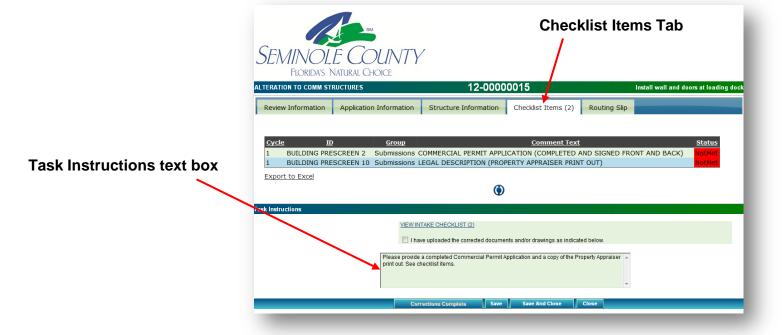
#### You MUST use Internet Explorer

If your default web browser is <u>not</u> Internet Explorer, you must enter ePlan manually by opening Internet Explorer and typing the following web address: https://eplan.seminolecountyfl.gov

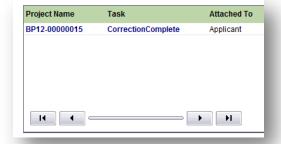




Review the checklist items (if any) by clicking on the Checklist Items tab and read any items listed in the Task Instructions text box. Click the "Save And Close" button at the bottom of the screen until you are ready to upload missing or corrected drawings and/or documents.



- 3. After you have identified the missing or corrected drawings and/or documents to upload, click on the project to open the project page.
- 4. Upload the drawings and/or documents as instructed on pages 11 & 12 of this guide.
- 5. Click on the "Task List" button in the project view and select the "CorrectionComplete" task in the Task List section.
- After you are satisfied that all the requirements have been met, select the "I have uploaded the corrected documents and/or drawings as indicated below" box and click the "Corrections



Complete" button at the bottom of the form. This will notify the Electronic Plan Review Submission Group that you are ready for Prescreen Review again.





### **Change Requests and Plan Resubmit**

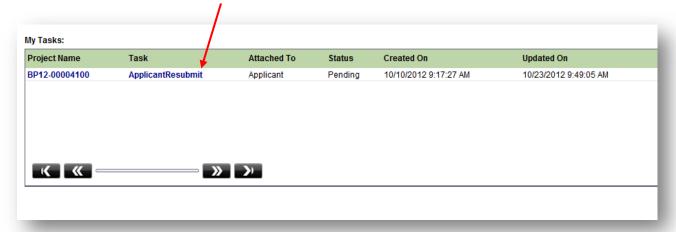
After plan review for your project is complete, change requests and/or review comments may require plan corrections or changes.

- 1. You will receive an e-mail notification from the Review Coordinator requesting corrected plans and/or documents.
- 2. Click the link "Log in to Electronic Plan Review" in the email to access your projects.





3. Once logged in, select the "ApplicantResubmit" task for the project requiring corrections to accept it and open the eForm to access the corrections requested.







- 4. The eForm has four sections that provide you with correction information:
  - Review Status
  - Review Agency (who requested the corrections)
  - Comments/Markups (click link to access markups)
  - Checklist Items (located on the "Checklist Items" tab at the top of the eForm)



- 5. In the "Department Review" section, the agency requesting the corrections is displayed. If there are markups attached, you will see the markup links in the comments/markup section at the bottom of the eForm (see page 19).
- 6. Click on the "Save And Close" button to exit the eForm.
- 7. Correct the plan drawing(s) as requested.





#### **Markups and Changemarks:**

- Standard markup names and colors will be used for each reviewing agency for easy identification. (See tables below and on the following page)
- A markup can have one or more changemarks.
- A changemark is a plan callout created by County review staff to quickly identify a markup and associated comments. (See sample changemark on the following page)
- Changemarks are created to quickly identify a markup and associated comments.
- Each agency changemark will be numbered starting from 01 for each sheet/file.

### Markup Name and Changemark Color Standards for <u>Planning & Development Projects</u>

REVIEW AGENCY	MARKUP NAME – Reviewer Initials	CHANGEMARK TITLE	MARKUP COLOR
Building Division	BLDG	BLDG 01-Issue Name	Orange
Environmental Services	ENV	ENV 01-Issue Name	Brown
Health Department	HEALTH	HEALTH 01-Issue Name	Yellow
Impact Analysis	IMPT	IMPT 01-Issue Name	Light Blue
Natural Resources	NAT	NAT 01-Issue Name	Green
Project Manager	PM	PM 01-Issue Name	Light Green
Public Safety - Fire	FIRE	FIRE 01-Issue Name	Red
Public Safety - Addressing	ADDR	ADDR 01-Issue Name	Pink
Public Works - Engineering	ENG	ENG 01-Issue Name	Purple
Telecommunications	TELE	TELE 01-Issue Name	Gray
Utilities	UTIL	UTIL 01-Issue Name	Blue





#### Markup Name and Changemark Color Standards for **Building Permits**

REVIEW AGENCY	MARKUP NAME – Reviewer Initials	CHANGEMARK TITLE	MARKUP COLOR
Arbor	ARBOR	ARBOR 01-Issue Name	Green
Building	BLDG	BLDG 01-Issue Name	Orange
Electrical	ELEC	ELEC 01-Issue Name	Yellow
Fire	FIRE	FIRE 01-Issue Name	Red
Flood Prone	FLOOD	FLOOD 01-Issue Name	Blue
Fuel Tanks	TANKS	FUEL 01-Issue Name	Gray
Graphics-Address	ADDR	ADDR 01-Issue Name	Pink
Mechanical	MECH	MECH 01-Issue Name	Blue
Plumbing	PLBG	PLBG 01-Issue Name	Light Brown
Product Approval	PA	PA 01-Issue Name	Dark Brown
P&D-Boat Dock	DOCK	DOCK 01-Issue Name	Light Green
P&D-Extended Review	PDEXT	PDEXT 01-Issue Name	Light Green
P&D-Impact Fees	IMPT	IMPT 01-Issue Name	Light Blue
P&D-Site Plan Review	PDSP	PDSP 01-Issue Name	Light Green
P&D-Zoning	PDZN	PDZN 01-Issue Name	Light Green
Signs-Zoning	SIGN	SIGN 01-Issue Name	Teal
Zoning	BDZN	BDZN 01-Issue Name	Purple

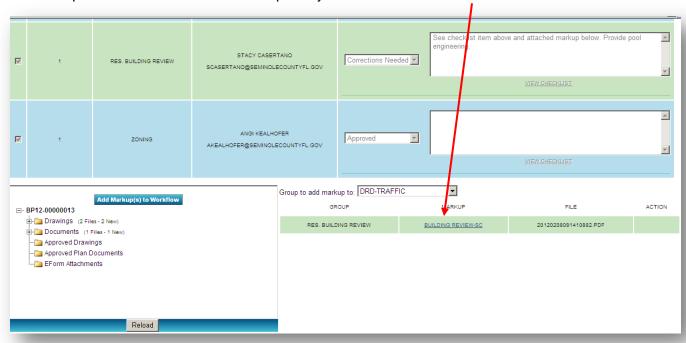




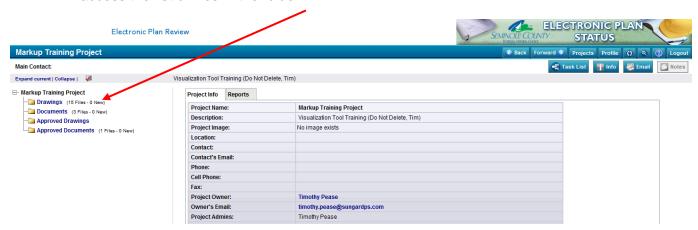


#### **How to Open Files with Markups**

1. If you are in the "Applicant Resubmit" eForm, click the review link in the "markup" section to open the file that contains markups for your review and correction.

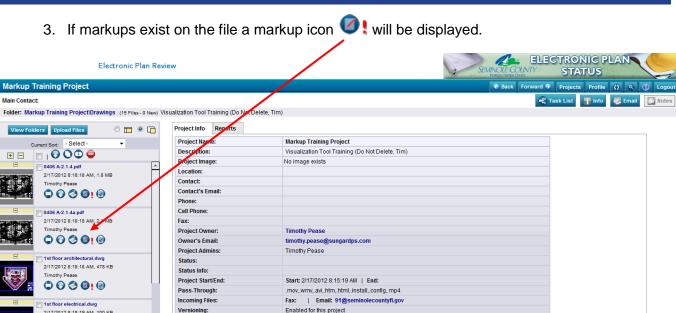


2. Another way to open the files is from the "Projects" page. After selecting the project you want to work with from the projects page, you must left click the appropriate folder to open and access the list of files in the folder.





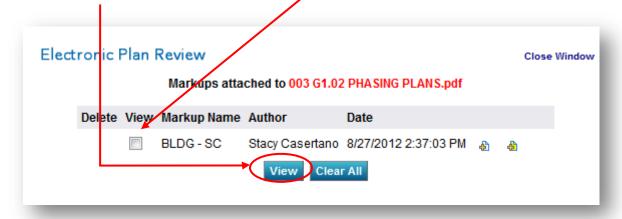




#### **How to Open Existing Markups:**

2/17/2012 8:18:19 AM, 100 KE Timothy Pease

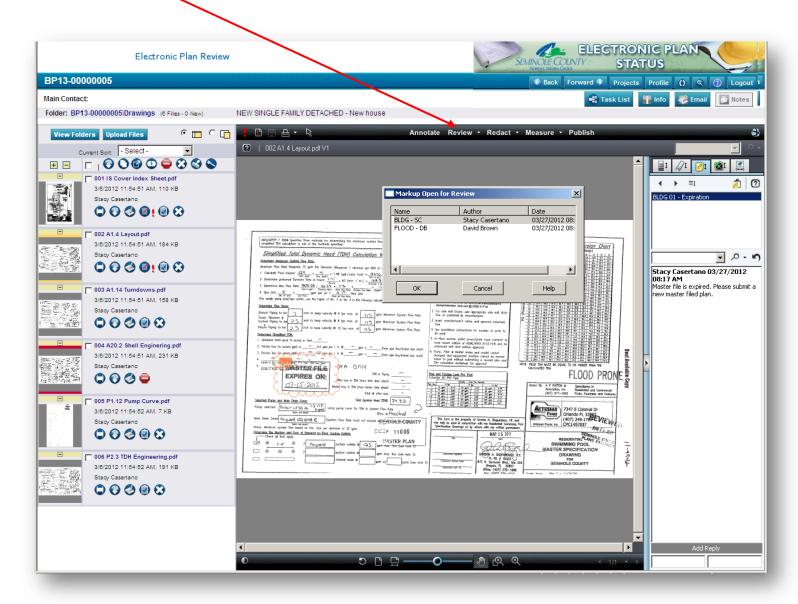
- 1. Click the markups icon **!** to open the list of markups attached to the file.
- 2. To view the markups on the file, click the "View" box beside the markup name(s) and then click the "View" button.







3. Click "Review" and markups open for review will appear.







4. Existing changemarks can be sorted by title, author, date, type, state, or position by selecting the appropriate

sorting order from the drop down list. Position sorts the changemarks notes in the order that they appear in the document pages.

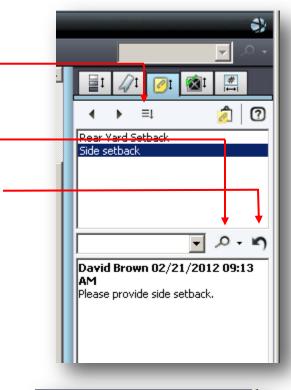
5. You can search and filter Changemarks notes by content and/or title by entering a word or phrase in the search text box. (Click Show All changemarks notes to the list.)

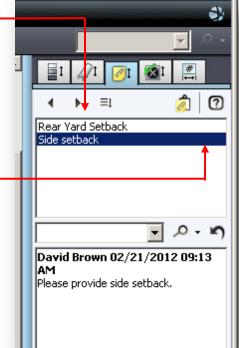
6. Click on a resulting changemarks note that you wish to view. The original changemarks text displays in the panel's lower frame, including any discussion replies that have been added. The current type and state of the changemarks note are displayed at the bottom of the panel.

7. You can progress sequentially through the changemarks notes by using the **Next** and **Previous** arrow buttons



- 8. The changemarks entities appear at the same magnification level the author created them.
- 9. You can extract information from one or all changemarks notes contained in a document through the copy changemarks dialog. Click to access this dialog, then open another program such as Microsoft Word and paste the information into the blank document.
- You can launch any hyperlinks present in the changemarks panel, which will launch the specified URL in a separate browser window.





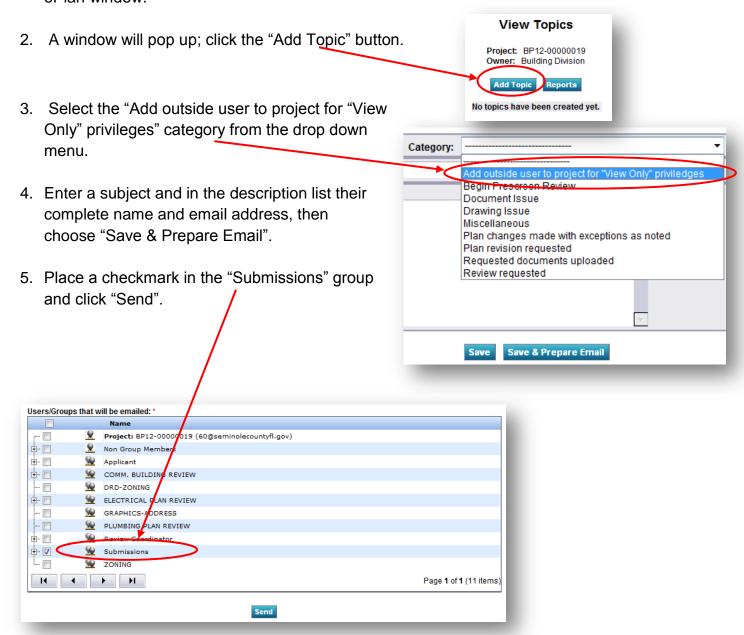




#### **Outside User Project Access**

To request an outside user have access to your drawings, changemarks and any other requested corrections, follow the steps outlined below:

1. The Submissions Group needs to know that you would like to add a user to the project for viewing access only. Do this by clicking the ePlan window.

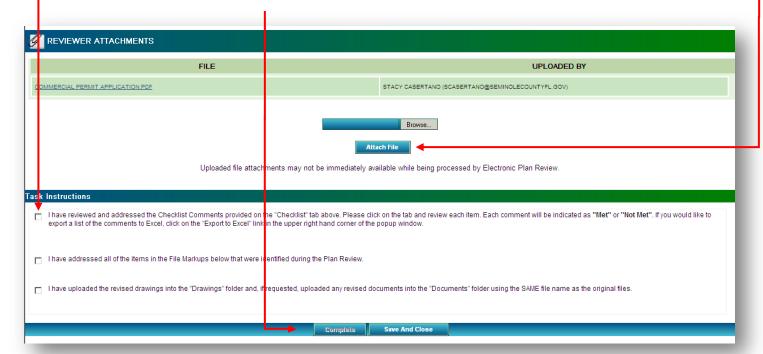






#### **Upload Corrections**

- 1. Login to Electronic Plan Review to upload the corrected drawing(s) and/or document(s).
- 2. Ensure that the corrected drawings retain the same file name and size as the originals.
- 3. Check if a new version number is created when you upload. If no new version number is created, confirm the file actually changed. If there were no changes to the file, a new version will not be created.
- 4. Verify all plans and documents that have markups have been corrected. Failure to submit corrected plans will result in a submittal returned for corrections.
- 5. When your corrected drawing(s) have been successfully uploaded into the correct folders, click on "Applicant Resubmit" task to open the e-form and go to the "Review Information" tab.
  - If a narrative explaining the plan corrections is being provided, please attach it to the eForm here. All other plan drawings and documents shall be uploaded to the correct project folders.
  - Confirm you have completed all task steps by reading and checking each box.
  - Click the "Complete" button. <u>IMPORTANT</u>: Without completing this step, you're application <u>WILL NOT</u> move forward in the review process. This action will notify the Review Coordinator Group of your resubmittal.







### <u>Approval</u>

#### **Building Permits**



When the plan review is approved by all reviewers and the permits have been created, you will be notified for final fee payment. After payment for the building permit has been made, you will receive an email notification that your approved plans and documents are available for download in the Approved Drawings and/or Approved Documents folder(s).



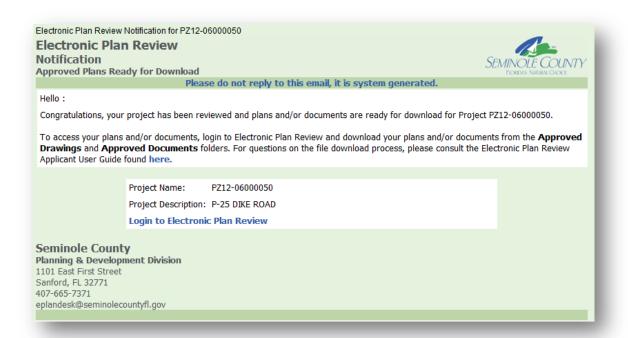
- The plans and associated specifications/documents need to be present on the jobsite.
   You will need to have the stamped plans printed at your local print shop if you aren't able to print large scale plans.
- The PEDDS Signature Document and the Signature Report need to be attached to the plans on the jobsite.





#### **Planning & Development Projects**

- When the plan review is approved by all reviewers, you will receive an approval letter in writing via postal mail or email.
- If a Pre-Construction meeting is required for your project, scheduling instructions for this
  meeting will be included in the approval letter. Your Approved Drawings and/or Approved
  Documents will not be made available to you until the assigned Project Manager in the
  Planning & Development Division has been notified by the Public Works Development
  Inspections Team that a site permit was issued.
- When you receive the system generated email shown below, this is an indication that you
  have access to the Approved Drawings and/or Approved Documents.



 Click on Approved Drawings and/or Approved Documents folder to view/download/print the files.







### **Plan Revisions During Construction**

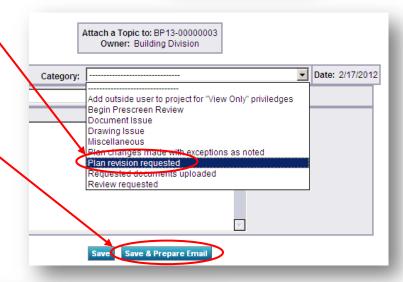
After your plans have been approved and construction has begun, sometimes changes arise that require revisions to your approved plans or documents.

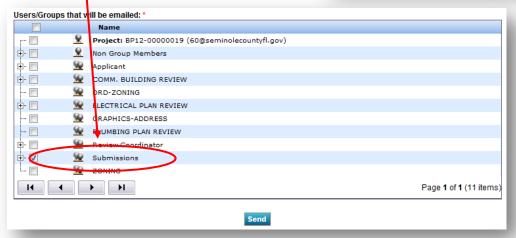
- 1. To do so, login to ePlan and enter the project for which you wish to submit a revision.
- 2. Click the "Email" icon near the top right corner of the ePlan window.
- 3. A window will pop up; click the "Add Topic" button.





- 4. Select the "Plan revision requested" category from the drop down menu.
- 5. Enter a subject and brief description then choose "Save & Prepare Email".
- Place a checkmark in the "Submissions" Group and click "Send".









7. Once the Submissions Group reviews the request, the project will be re-opened and returned to the applicant. Accept the "CorrectionComplete" task to open the eForm. Follow the instructions provided.



- 8. After uploading any requested form(s) and all the revised plans and/or documents, check the box acknowledging the upload and click "Corrections Complete".
- 9. The review process of the plan revision will begin and the approval process outlined on page 25 will take place. The stamped plan revisions will need to be printed and present on the jobsite.